HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Alberta

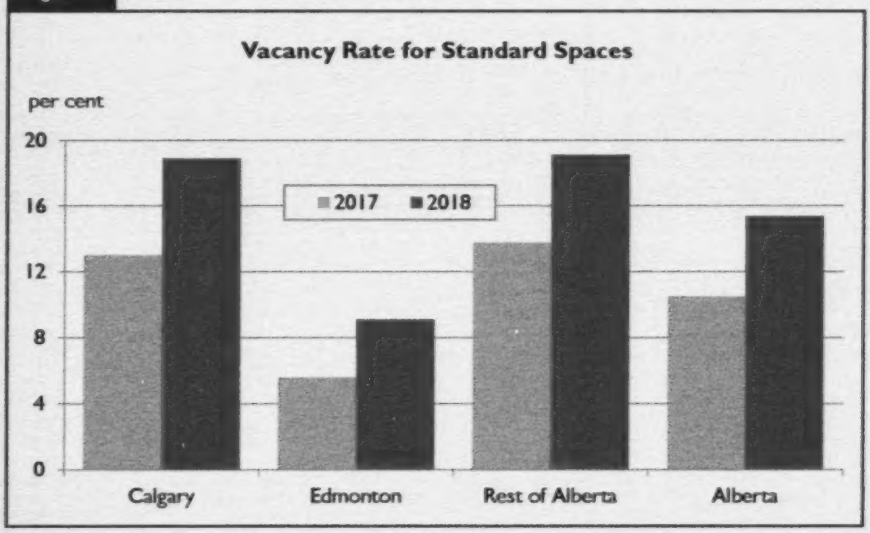
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2018

Highlights

- The overall vacancy rate for a standard space in retirement homes in Alberta increased from 10.5% in 2017, to 15.4% in 2018.
- The vacancy rate increase was the largest in Calgary, up 5.9 percentage points to 18.9% in 2018.
- Part of the increase in vacancy rate was due to an increase in supply of units as the universe of spaces increased from 12,624 units in 2017 to 13,655 units in 2018.
- Demand for units has also increased by 4.4% as the number of seniors living in standard spaces increased from 12,477 in 2017 to 13,030 in 2018.
- Overall average monthly rent for a standard space in Alberta was $3,296 in 2018 compared to $3,015 in 2017.

Figure 1



Source: CMHC

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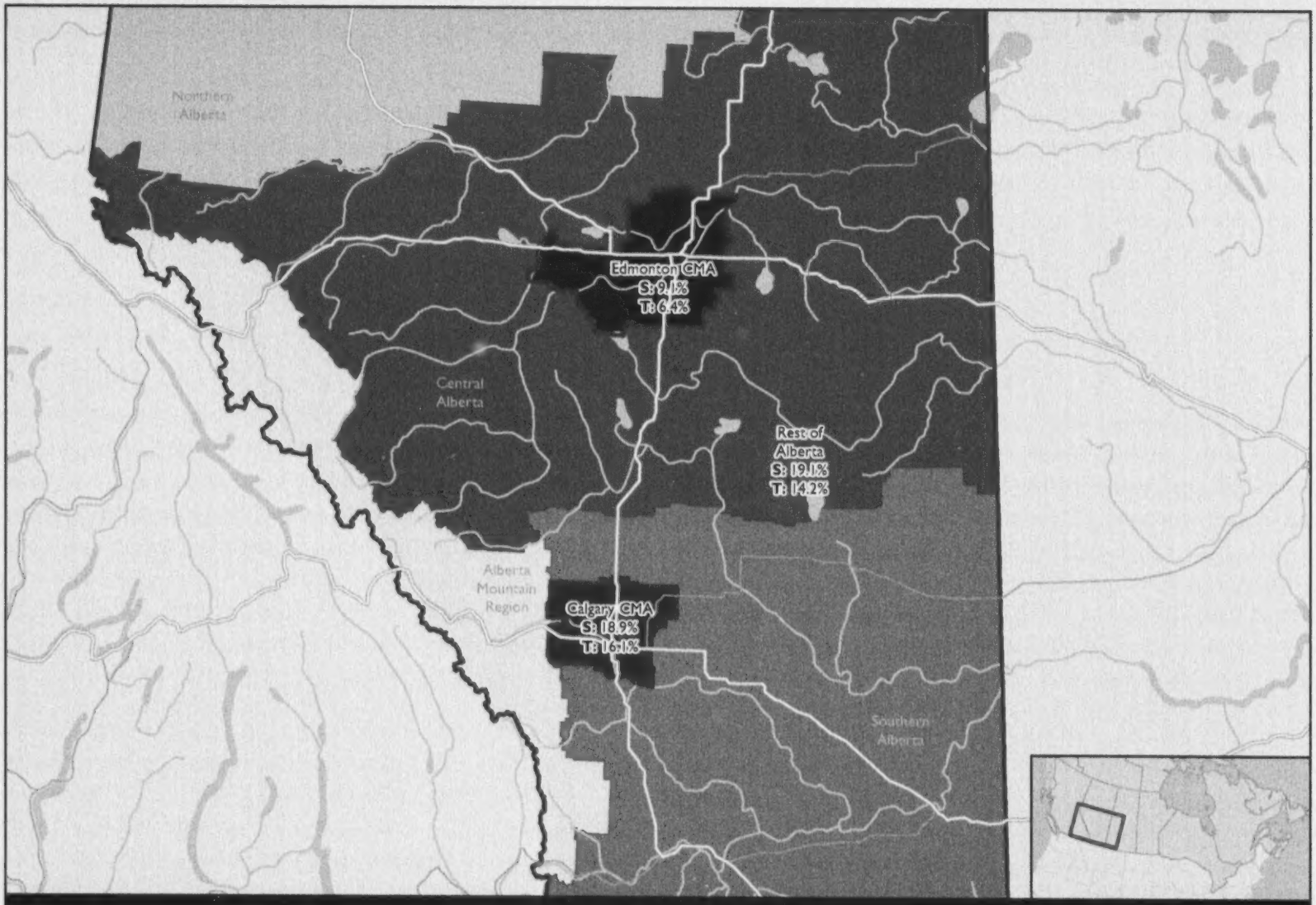

Alberta Vacancy Rate of Standard and Total (Universe) Spaces

Province Total
S: 15.4%
T: 11.9%

S: Standard Spaces
T: Total Spaces (Universe)

Number of Spaces

54	1548	4737
316	1786	5214

0 50 100 km

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Calgary CMA	**	**	15.3	21.1	12.0	18.7	10.6	13.8	13.0	18.9
Edmonton CMA	**	**	6.6	11.5	5.6	8.7	4.7	8.3	5.6	9.1
Rest of Alberta	**	**	17.6	24.1	13.4	17.5	10.1	20.3	13.8	19.1
Alberta	**	**	**13.4**	**19.3**	**9.9**	**14.4**	**7.9**	**13.3**	**10.5**	**15.4**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $2,000		$2,000 - $2,499		$2,500 - $2,999		$3,000 - $3,499		$3,500 and More		Total Where Rents are Known	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Calgary CMA	20.0	2.9	11.6	12.4	9.2	18.6	14.4	21.7	13.7	19.7	13.0	18.9
Edmonton CMA	7.2	8.6	3.2	6.2	4.1	5.8	7.2	12.4	6.5	10.2	5.6	9.1
Rest of Alberta	17.0	19.7	11.3	15.8	12.9	16.6	10.0	24.3	14.5	23.8	13.8	19.1
Alberta	**12.6**	**11.9**	**8.2**	**11.0**	**8.3**	**14.8**	**10.7**	**18.1**	**11.9**	**17.4**	**10.5**	**15.4**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

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1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Alberta

Centre	Vacancy Rate		Average Rent	
	2017	2018	2017	2018
Calgary CMA	4.7	5.0	6,245	5,595
Edmonton CMA	1.6	0.9	5,426	4,588
Rest of Alberta	9.5	6.7	3,982	3,833
Alberta	**5.1**	**4.0**	**5,456**	**4,796**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Alberta

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2017	2018				
Calgary CMA	4,737	11.3	16.1	37	4,362		
Edmonton CMA	5,214	4.2	6.4	40	5,272		
Rest of Alberta	3,704	12.3	14.2	49	3,396		
Alberta	**13,655**	**8.8**	**11.9**	**126**	**13,030**	**228,100**	**5.7**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

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2.1 Universe of Total Spaces by Unit Type Alberta				
Centre	**Semi Private/ Bachelor**	**One Bedroom**	**Two Bedroom +**	**Total**
Calgary CMA	2,145	2,129	463	4,737
Edmonton CMA	1,458	3,042	714	5,214
Rest of Alberta	1,667	1,624	413	3,704
Alberta	**5,270**	**6,795**	**1,590**	**13,655**

2.2 Universe by Unit Type Alberta				
Centre	**Semi Private/ Bachelor**	**One Bedroom**	**Two Bedroom +**	**Total**
Calgary CMA	**2,145**	**2,129**	**463**	**4,737**
Standard Spaces	1,150	1,845	435	3,430
Non-Standard Spaces	740	108	4	852
Unknown Spaces	255	176	24	455
Edmonton CMA	**1,458**	**3,042**	**714**	**5,214**
Standard Spaces	433	1,820	483	2,736
Non-Standard Spaces	879	554	71	1,504
Unknown Spaces	146	668	160	974
Rest of Alberta	**1,667**	**1,624**	**413**	**3,704**
Standard Spaces	361	1,306	380	2,047
Non-Standard Spaces	1,204	213	9	1,426
Unknown Spaces	102	105	24	231
Alberta	**5,270**	**6,795**	**1,590**	**13,655**
Standard Spaces	1,944	4,971	1,298	8,213
Non-Standard Spaces	2,823	875	84	3,782
Unknown Spaces	503	949	208	1,660

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2.3 Universe of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $2,000	$2,000 - $2,499	$2,500 - $2,999	$3,000 - $3,499	$3,500 and More
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Calgary CMA	2.0	7.3	14.6	10.9	65.2
Edmonton CMA	20.7	19.0	10.1	18.9	31.3
Rest of Alberta	17.0	26.8	26.1	15.7	14.4
Alberta	**12.2**	**16.1**	**15.7**	**14.9**	**41.1**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Alberta

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Calgary CMA	0.0	12.1	**	81.8	**	**	90.9	27.3
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	**	3.7	85.2	**	**	100.0	29.6
Edmonton CMA	**	**	**	**	69.7	**	93.9	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	92.3	**
Rest of Alberta	2.1	**	6.3	76.7	69.0	**	91.7	9.1
10 - 49	**	13.9	13.9	72.2	**	**	58.3	**
50 - 89	4.1	**	8.2	**	**	**	95.9	**
90 or more	**	**	**	92.7	**	**	100.0	**
Alberta	**2.7**	**18.1**	**7.1**	**72.1**	**64.0**	**54.4**	**92.2**	**15.4**
10 - 49	0.0	**	7.6	75.4	**	**	**	0.0
50 - 89	3.0	**	9.3	**	72.5	**	93.7	**
90 or more	3.1	13.6	**	77.2	62.6	62.0	96.9	21.7

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Alberta

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Calgary CMA	**87.9**	**	**	**69.7**	**93.9**	**87.9**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	100.0	**
90 or more	96.3	**	**	74.1	96.3	92.6
Edmonton CMA	**	**	**	**	**81.8**	**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	84.6	76.9
Rest of Alberta	**60.3**	**2.1**	**	**	**66.7**	**65.6**
10 - 49	**	**	**	**	**	86.1
50 - 89	**	0.0	**	**	80.9	**
90 or more	80.5	6.1	**	**	67.5	81.7
Alberta	**67.6**	**10.1**	**	**44.7**	**79.6**	**72.5**
10 - 49	**	0.0	0.0	0.0	**	**
50 - 89	**	0.0	**	**	82.6	**
90 or more	82.1	**	**	54.2	85.5	84.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Calgary CMA	**	**	2,873	3,121	3,868	4,242	4,680	5,154	3,623	3,982
Edmonton CMA	**	**	2,052	1,877	2,742	2,965	3,557	3,634	2,759	2,911
Rest of Alberta	**	**	2,028	2,122	2,495	2,655	3,243	3,408	2,517	2,697
Alberta	**	**	**2,460**	**2,644**	**3,051**	**3,347**	**3,793**	**4,072**	**3,015**	**3,296**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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01 Building Structure Makeup (%) Alberta		
Centre	**Concrete Frame**	**Wood Frame**
Calgary CMA	41.7	58.3
Edmonton CMA	57.5	42.5
Rest of Alberta	20.8	79.2
Total	**38.7**	**61.3**

02 Ancillary Services, Cable and Telephone and Optional Costs (% of residences) Alberta					
Centre	**Services**	**Included in Rent (%)**	**Tenant Arrange (%)**	**Optional (%)**	**Average Cost if Optional ($)**
Calgary CMA	Cable	62.2	21.6	16.2	54.75
	Telephone	27.0	54.1	16.2	**
Edmonton CMA	Cable	62.5	30.0	7.5	**
	Telephone	2.5	82.5	12.5	**
Rest of Alberta	Cable	42.9	26.5	26.5	43.67
	Telephone	16.3	57.1	20.4	**
Total	**Cable**	**54.8**	**26.2**	**17.5**	**47.33**
	Telephone	**15.1**	**64.3**	**16.7**	**35.94**

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O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Alberta

Centre	Before 1990	1990 - 1999	2000 or Later	Total
Calgary CMA	**	22.8	18.1	18.9
Edmonton CMA	**	5.8	10.5	9.1
Rest of Alberta	**	**	18.6	19.1
Alberta	**11.0**	**16.5**	**15.8**	**15.4**

O3.2 Vacancy Rates (%) of Total Spaces[1] by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Calgary CMA	**	**	11.7	15.4	11.4	17.9	10.4	13.7	11.3	16.1
Edmonton CMA	**	**	3.4	4.4	4.4	7.1	4.3	7.9	4.2	6.4
Rest of Alberta	**	**	11.6	10.6	13.4	16.3	10.4	20.4	12.3	14.2
Alberta	**5.9**	**	**9.2**	**10.6**	**8.9**	**12.8**	**7.6**	**12.9**	**8.8**	**11.9**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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O3.3 Universe of Total Spaces[1] by Size of Residence Alberta

Centre	< 50 Spaces		50 - 99 Spaces		100 + Spaces		Median
	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Residence Size
Calgary CMA	2	67	6	477	29	4,193	131
Edmonton CMA	3	68	9	728	28	4,418	124
Rest of Alberta	10	215	25	1,704	14	1,785	68
Alberta	**15**	**350**	**40**	**2,909**	**71**	**10,396**	**105**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

O3.4 Vacancy Rate (%) and Universe of Total Spaces[1] by Date Residence Opened Alberta

Centre	Before 2001		2001 or Later		Total	
	Vacancy Rate	Universe	Vacancy Rate	Universe	Vacancy Rate	Universe
Calgary CMA	17.1	1,190	13.8	3,547	14.6	4,737
Edmonton CMA	4.3	1,976	5.7	3,238	5.2	5,214
Rest of Alberta	13.6	529	13.2	3,175	13.3	3,704
Alberta	**9.7**	**3,695**	**11.0**	**9,960**	**10.6**	**13,655**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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04 Average Rents ($) of Standard Spaces by Date Residence Opened
Alberta

Centre		Before 1990	1990 - 1999	2000 or Later	Total
Calgary CMA	Semi-Private	**	**	**	**
	Bachelor	**	3,055	3,184	3,121
	One Bedroom	**	4,231	4,222	4,242
	Two Bedroom +	**	**	5,053	5,154
	Total	**	3,720	4,072	3,982
Edmonton CMA	Semi-Private	**	**	**	**
	Bachelor	**	**	2,126	1,877
	One Bedroom	**	3,110	3,352	2,965
	Two Bedroom +	**	**	3,762	3,634
	Total	**	3,026	3,318	2,911
Rest of Alberta	Semi-Private	**	**	**	**
	Bachelor	**	**	2,024	2,122
	One Bedroom	**	**	2,610	2,655
	Two Bedroom +	**	**	3,391	3,408
	Total	**	**	2,682	2,697
Total	**Semi-Private**	**	**	**	**
	Bachelor	**2,110**	**2,785**	**2,734**	**2,644**
	One Bedroom	**2,205**	**3,522**	**3,460**	**3,347**
	Two Bedroom +	**	**4,360**	**4,066**	**4,072**
	Total	**2,271**	**3,293**	**3,444**	**3,296**

05 Number of Residents, Number of Residents Living Alone and Number of Residents in Heavy Care Units
Alberta

Centre	2017	2018
Calgary CMA		
Total number of residents	4,013	4,362
Number of residents living alone	3,316	3,583
Total number of couples	348	389
Number of residents in heavy care units	776	878
Edmonton CMA		
Total number of residents	5,060	5,272
Number of residents living alone	4,322	4,397
Total number of couples	369	390
Number of residents in heavy care units	1,187	1,361
Rest of Alberta		
Total number of residents	3,405	3,396
Number of residents living alone	2,908	2,866
Total number of couples	**	265
Number of residents in heavy care units	**	1,223
Alberta		
Total number of residents	12,477	13,030
Number of residents living alone	10,547	10,847
Total number of couples	965	1,044
Number of residents in heavy care units	2,894	3,463

The following letter codes are used to indicate the reliability of the estimates:

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

CMHC HELPS CANADIANS MEET THEIR HOUSING NEEDS.

Canada Mortgage and Housing Corporation (CMHC) has been helping Canadians meet their housing needs for more than 70 years. As Canada's authority on housing, we contribute to the stability of the housing market and financial system, provide support for Canadians in housing need, and offer unbiased housing research and advice to Canadian governments, consumers and the housing industry. Prudent risk management, strong corporate governance and transparency are cornerstones of our operations.

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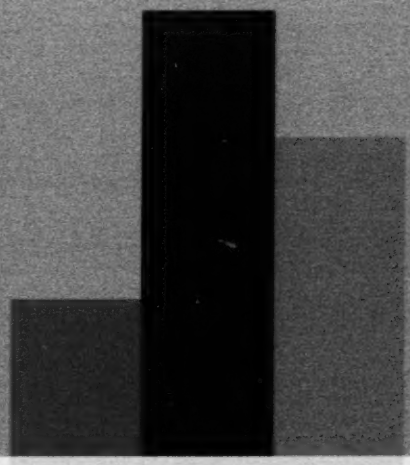

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